119TH FEB PRE-RETIREMENT SEMINAR

DECEMBER 2, 2020

AGENDA

7:30 A.M.	REGISTRATION	
8:00 A.M.	WELCOME	**STEPHANIE WILLIAMS** Planning Committee Chairperson Equal Employment Opportunity Commission
8:05 A.M.	PRESENTATION	**SOCIAL SECURITY** Jewell Colbert Social Security Administration
8:55 A.M.	PRESENTATION	**MEDICARE** John Montalto US Department of Health and Human Services Centers for Medicare & Medicaid Services
9:45 A.M.	*BREAK*	
10:00 A.M.	PRESENTATION	**LONG TERM CARE** Annette Aleksa Long Term Care Partners
10:50 A.M.	PRESENTATION	**ESTATE PLANNING** Craig Reaves Reaves Law Firm, P.C.
12:00 P.M.		**LUNCH**
1:00 P.M.	PRESENTATION	**THRIFT SAVINGS PLAN** Randy Hallier Financial Workshops, LLC
2:25 P.M.	*BREAK*	
2:40 P.M.	PRESENTATION	**CSRS** and **FERS** Randy Hallier Financial Workshops, LLC
4:30 P.M.	ADJOURN	

PRESENTERS

JEWELL COLBERT began his federal career with the Social Security Administration in St. Joseph, MO on February 18, 1986 as a Claims Representative. He is a 1983 graduate of Missouri Western State University with a Bachelor of Arts degree in Communications. He has held a variety of leadership positions with the agency including assignments in the District Office, Mid-America Program Service Center, Area Director's Office and the Regional Office. As the Regional Communications Director since 2011, Jewell has worked with federal, state and local organizations and communities throughout the region to educate the public on the programs administered by SSA. He has also received several regional and national Social Security honorary awards for his exemplary customer service and leadership including the Regional Commissioner's Citation, Deputy Commissioner Citation and the Commissioner of Social Security Citation, which is the agency's top honorary award.

JOHN MONTALTO, has worked for CMS for 6 years as a Health Insurance Specialist. John received his Master's in Social Work, MSW from Fordham University in New York City and is a licensed clinical social worker in New York State. John has held leadership positions for the New York State Office of Mental Health, as well as the Minneapolis VA Medical Center. John served in Iraqi Operation Enduring Freedom as a Combat Stress Control Officer for the U.S. Army.

ANNETTE ALEKSA, is a Senior Account Manager at Long Term Care Partners, LLC, and Insured by John Hancock Financial Services, Inc., which administers the Federal Long Term Care Insurance Program. Ms. Aleksa joined Long Term Care Partners in February of 2004 and is a Certified Long Term Care Senior Account Manager. Before joining LTCP, she spent five years as a Healthcare Recruitment Specialist placing RNs and LPNs in skilled nursing facilities and hospitals throughout the United States. Ms. Aleksa is a native of Lawrence, Massachusetts and resides in New Hampshire.

CRAIG C. REAVES, CELA, is an attorney with Reaves Law Firm, P.C., in Kansas City, Missouri. He practices law in Kansas and Missouri with major emphasis in the areas of estate planning, elder law, special needs trusts and planning for persons who have a disability. Mr. Reaves was one of the first attorneys to become a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation, and has been certified since 1995. He is a past President and Fellow of the National Academy of Elder Law Attorneys and a Fellow of the American College of Trust and Estate Counsel (ACTEC). Mr. Reaves is included in the current editions of The Best Lawyers in America and Super Lawyers. He is an adjunct professor of law at three law schools: the University of Kansas, the University of Missouri-Kansas City, and Stetson University in Florida.

RANDY HALLIER serves as a Managing Director with Creating Planning, working directly with clients to develop and implement a strategy to address their financial, investment, tax, and estate planning needs. Prior to joining Creative Planning, Randy was the President and Founder of Retirement Plus, Inc. in Leawood, Kansas where he served as the Chief Compliance Officer as well as the Co-Executive Investment Officer for the firm. The philosophies of Retirement Plus Inc. and Creative Planning both ascribe to the comprehensive and holistic method of incorporating financial planning, tax planning, investment management, and estate planning within a single relationship. Randy was recognized as advisor of the year 2009 by Reuters Advice Point. Randy has been ranked as the #26 Financial Advisor in the state of Florida on Barron's list of 'Top Financial Advisors by State' (2019*). He is also a published writer and author and is responsible for contributing numerous articles over the years to Boomer Magazine, Research Magazine and other periodicals. He provided the foreword for the book, The Art of Investing and Portfolio Management and is the author of the book How to Work for Uncle Same and Retire Rich. Randy also founded the radio show program The Bottom Line and has been a frequent guest on numerous other radio and television programs that feature financial and investment related topics. Randy also founded Financial Workshops, LLC, a leading provider of financial training to large employers. As a skilled presenter, he has led more than 500 workshops for various organizations and Federal agencies throughout the country over the past 20 years. Randy attended the University of Kansas and majored in education and completed his academic career at the University of Missouri at Kansas City Bloch School of Business where he obtained his certificate in financial planning. Randy is a Certified Financial Planner™ practitioner and subscribes to the ethical requirements as set forth by the Certified Financial Planner Board of Standards®. Randy enjoys sailing his own boat as well as chartering sail boats throughout the world.